



United States Army Medical Research Acquisition Activity USAMRAA



Helping Us Help You: A Model Requirements Package



"Army Contracting: One Community Serving Our Soldiers, Serving Our Nation"





Model Requirements Package



CONTRACTS & SIMPLIFIED ACQUISITIONS



Model Requirements Package



► Presenters:

**Michael A. Younkens, Chief, CSC Gold
Contracting Officer/Grants Officer
Mike.Younkens@amedd.army.mil
Ph: 301-619-2503, Fax: 301-619-2195**

**Patricia A. Evans, Chief, OSC Silver
Contracting Officer/Grants Officer
Pat.A.Evans@us.army.mil
Ph: 301-619-7354, Fax: 301-619-2505**

Model Requirements Package

- ▶ Why is a complete package important?
 - ◆ Meeting the customer's expectations
 - ✖ What they need, when they need it

- ▶ Who is responsible for providing a complete package?
 - ◆ A shared responsibility
 - ✖ The customer (requiring activity)
 - ✖ Submit complete Purchase Request (PR) to PRCentral with Supporting documents
 - ✖ USAMRAA's Assistance



Model Requirements Package



- ▶ What should a complete package contain?
 - ◆ An adequate purchase description
 - ◆ A cost or price estimate
 - ◆ Delivery or performance requirements
 - ◆ Source(s) information
 - ◆ MEDCOM approval
 - ◆ Use of Non-DoD Contracts approval Memo
 - ◆ Sole Source Justification

Model Requirements Package



- ▶ Questions to ask yourself:
 - ◆ What is my requirement, e.g., service, supply, R&D, construction...?
 - ◆ Is there an existing contract or agreement that would satisfy the requirement?
 - ◆ If so, should we modify the existing contract, order, or agreement? OR...
 - ◆ Should a new task or delivery order be issued against an existing "master" contract or agreement? OR...
 - ◆ Is this a new procurement?

Model Requirements Package



- ▶ If Existing Award:
 - ◆ Is requirement within scope?
 - ✗ Is it a reasonable increase in the award effort?
 - ✗ A rule of thumb for award amount increase is 30-40%, talk with your Contracting Officer.
 - ◆ Does the period of performance or delivery requirement coincide with the existing contract, order or agreement?
- ▶ If New award, then.....

Model Requirements Package

- ▶ Reference –FAR and DFARS (can be found on our web page at <http://www.usamraa.army.mil> – click on “References.
- ▶ Reference –Acquisition Desk Reference (can be found at <http://www.usamraa.army.mil> – click on “References.

- ▶ FAR PART 7 – **Acquisition Planning**

FAR Part 7.102 states: **Agencies** shall perform acquisition planning and conduct market research (see Part 10) for all acquisitions in order to promote and provide for—

- ◆ (1) Acquisition of commercial items or, to the extent that commercial items suitable to meet the agency’s needs are not available, non-developmental items, to the maximum extent practicable; and
- ◆ (2) Full and open competition (see Part 6) or, when full and open competition is not required in accordance with Part 6, to obtain competition to the maximum extent practicable, with due regard to the nature of the supplies or services to be acquired.

Model Requirements Package

- ▶ FAR 71.04(a) states “**Acquisition planning should begin as soon as the agency need is identified**, preferably well in advance of the fiscal year in which contract award or order placement is necessary. In developing the plan, the planner shall form a team consisting of all those who will be responsible for significant aspects of the acquisition, such as contracting, fiscal, legal, and technical personnel.”
- ▶ (b) Requirements and logistics personnel should avoid issuing requirements on an urgent basis or with unrealistic delivery or performance schedules, since it generally restricts competition and increases prices.
- ▶ (c) **The planner shall coordinate with and secure the concurrence of the Contracting Officer in all acquisition planning.** If the plan proposes using other than full and open competition when awarding a contract, the plan shall also be coordinated with the cognizant Competition Advocate.

Model Requirements Package

- ▶ (d)(1) The planner shall **coordinate the acquisition plan or strategy with the cognizant small business specialist** when the strategy contemplates an acquisition meeting the dollar amounts in paragraph (d)(2) of this section unless the contract or order is entirely reserved or set-aside for small business under Part 19.
- ▶ (2)(i) The strategy shall be **coordinated with the cognizant small business specialist** in accordance with paragraph (d)(1) of this section if the estimated contract or order value is—
 - ◆ (A) **\$7.5 million or more for the Department of Defense;**
- ▶ (ii) If the strategy contemplates the award of multiple contracts or orders, the thresholds in paragraph (d)(2)(i) of this section apply to the cumulative maximum potential value, including options, of the contracts and orders.
- ▶ **REFERENCE 7.105 "Contents of written acquisition plans"**

Model Requirements Package

- ▶ Acquisition Plans DFARS 207.103(d)(1) –
 - ◆ (A) Acquisition for **development**, as defined in FAR 35.001, when the total cost of all contracts for the acquisition program is estimated at \$5 million or more;
 - ◆ (B) Acquisition for **production or services** when the total cost of all contracts for the acquisition program is estimated at \$30 million or more for all years or \$15 million or more for any fiscal year.



Model Requirements Package



- ▶ Electronic Purchase request
 - ◆ Period of Performance/Delivery Date
 - ◆ Valid funding
 - ◆ Adequate description/minimum essential characteristics
 - ◆ Point of Contact, (name, phone #), if applicable, Technical POC
 - ◆ Options, if applicable
 - ◆ Delivery information
 - ◆ Award number for existing agreement
 - ◆ Suggested Source(s)

Model Requirements Package

- ▶ Government Estimate (Fixed Price) – Service/Construction
 - ◆ Labor costs
 - ◆ Material costs
 - ◆ Other Direct Costs
 - ◆ Bonds, insurance (Construction)

- ▶ Independent Cost Estimate – Service/R&D
 - ◆ Rationale for estimate
 - ◆ Direct labor costs,
 - ◆ Other Direct Costs (ODC's),
 - ◆ Indirect costs, and
 - ◆ Profit/Fee Source List



Model Requirements Package



- ▶ Commercially Available Supply or Service
 - ◆ Supply - Minimum Essential requirements, quote(s)
 - ◆ Service – Statement of Work, quote(s)
 - ◆ Supply less than \$100,000 –
 - ✗ GSA – provide quote(s)
 - ✗ Open market - Set aside for small business



Model Requirements Package



▶ Draft Sole Source

- ◆ Ref FAR Part 6 (Circumstances Permitting other than Full & Open Competition)
- ◆ Ref AFARS 5153.9004 and 9005 for format
- ◆ Above \$100,000 – formal J&A
- ◆ Below \$100,000 – informal J&A, per Account Manager

▶ Source List

- ◆ Contractors known to be able to provide supplies or services required (Previous Contracts)
- ◆ Sources Sought/RFI – can be utilized to obtain sources in market research stage

Model Requirements Package



- ▶ GSA - >\$100,000, Use of Non-DoD contracts Memo
- ▶ MEDCOM approval – Services only, Army Customers only
- ▶ Research and Development Contracts (for awards made under BAA/PAA's)
 - ◆ Certificate of Environmental Compliance (CEC)
 - ✖ Completed by awardee prior to award
 - ◆ Record of Environmental Consideration (REC)
 - ✖ Completed by Customer
 - ◆ Required for competitive awards, but not part of initial requirements package

Model Requirements Package

- ▶ Draft Synopsis, if applicable
- ▶ Statement of Work (SOW)/Performance Work Statement/Statement of Objectives (SOO)
 - ◆ Service – Should be Performance Based, unless waiver received.
 - ✗ Quality Assurance Plan
 - ✗ Location (on-site or off-site)
 - ◆ Supplies – Should be commercial items, not Government unique.
 - ✗ Model, Part Number, minimum significant characteristics
 - ◆ Research and Development – BAA award or competed
 - ✗ Animal use, Human use



Model Requirements Package



- ▶ Proposed Contracting Officer's Representative - COR
 - ◆ Include name, e-mail and phone number
 - ◆ Should have COR/GOR training in order to serve as COR, however, 6 months to obtain training.
 - ✗ USAMRAA provides classroom training and web training is available
 - ✗ Provide copy of certificate to Contract Specialist

Model Requirements Package

► Deliverables

- ◆ Supplies: location if other than warehouse
- ◆ Reports: how often, location of delivery, and number of copies, unless electronic
 - ✗ Services
 - ✗ Research & Development
 - ✗ Construction

► Special Contract Requirements

- ◆ Good Laboratory Practices
- ◆ Technical Data Package (TDP)



Model Requirements Package



- ▶ Technical/Business Proposal Instructions – Section L
- ▶ Pre-Proposal Conference
- ▶ Site Visit
- ▶ Proposal Submission Requirements:
 - ◆ General instructions provide format and describe the approach for the development and presentation of proposal data
 - ◆ Provide number of hard copies and/or digital copies, formatting and page limitation, if applicable
 - ◆ Describes in detail how each offeror must provide their proposal in order to be technically evaluated (e.g., Executive Summary, Technical Capability, Performance Management, Past Performance, Subcontracting, cost, etc.)



Model Requirements Package



- ▶ Evaluation Factors for Award – Section M:
 - ◆ Provide list of factors and sub-factors to evaluate Proposals
 - ◆ Factors determine which offer is most advantageous to Government
 - ◆ Factors must be definable in qualitative terms and represent key areas of importance
 - ◆ Colors (e.g., red, amber, green, blue) or adjectival (e.g., poor, fair, good, excellent)



Model Requirements Package



- ▶ Common Evaluation Factors Used:
 - ◆ Past Performance (Mandatory)
 - ◆ Technical Approach to Performing the Work
 - ◆ Qualifications of Technical Personnel
 - ◆ Quality Assurance Programs and Plans
 - ◆ Management Capabilities and organization for the proposed work
 - ◆ Scheduling and delivery
 - ◆ Cost Realism
 - ◆ Price (Mandatory)



Model Requirements Package



- ▶ Source Selection Evaluation Board Members
 - ◆ Provide names, phone numbers and e-mails of proposed members
 - ◆ Board Members should be knowledgeable about the requirement
 - ◆ Should be available for the time necessary to perform reviews